Sustainably Sourcing Big Ideas

The Donor Investor Imperative Part Two
Donor Investor Imperative Webconference Series

Part Two of a Four-Part Sequence

1. The Rise of the Donor Investor
   Available on-demand at eab.com

2. Sustainably Sourcing Big Ideas

3. Communicating the Impact of Big Ideas
   March 8

4. Perfecting the Pitch to Appeal to Today’s Donors
   March 29

Register for forthcoming webconferences at:
Donors Seek Compelling Ideas

MacArthur Foundation Sets the Bar

$100M grant competition open to anyone in any field anywhere

Goal of solving “a critical problem affecting people, places, or the planet.”

Impact must be “meaningful, verifiable, durable, and feasible.”

Transparent selection process

Others Follow Suit

“By making big bets today, we will dramatically expand opportunities for all.”

- Goals: advancing human potential and promoting equal opportunity
- Focus areas: science, education
- Researchers, advocates, engineers, and scientists work together to find breakthroughs and create new technologies

A Lack of Ideas on a Grand Scale

Desperately Seeking Projects to Inspire Donors

“What I’m not finding at our institution are enough big ideas that will take the $1M gift and make that next gift $5M. The ideas are very operational. They’re not thinking longer-term or coming to me and saying “if I had a $20M gift, I could do X, Y, and Z.” We’re just not seeing those conversations emerge.”

Vice President, Development
Public Research Institution

Source: Advancement Forum interviews and analysis.
### Why Finding Big Ideas Is Hard

**Too Many Ideas, Not Enough Filters**

<table>
<thead>
<tr>
<th>Idea Sources</th>
<th>Institutional Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Donor Interests</strong></td>
<td>• Idiosyncratic</td>
</tr>
<tr>
<td></td>
<td>• Mismatch with institutional needs</td>
</tr>
<tr>
<td></td>
<td>• Unrealistic expectations</td>
</tr>
<tr>
<td></td>
<td>&quot;The donor wants to start a new college, but we’ll never be great in that area.&quot;</td>
</tr>
<tr>
<td><strong>Deans’ Needs</strong></td>
<td>• Focus on today’s operations</td>
</tr>
<tr>
<td></td>
<td>• Limited vision for tomorrow</td>
</tr>
<tr>
<td></td>
<td>• Unappealing to donors</td>
</tr>
<tr>
<td></td>
<td>&quot;Donors don’t want to pay to clean the carpets and keep the lights on.</td>
</tr>
<tr>
<td><strong>Faculty Pet Projects</strong></td>
<td>• Perceived as advancement “playing favorites”</td>
</tr>
<tr>
<td></td>
<td>• Difficult to sustain over time</td>
</tr>
<tr>
<td></td>
<td>• Unaligned with CBO priorities</td>
</tr>
<tr>
<td></td>
<td>&quot;Faculty only care about their tiny corner of the universe&quot;</td>
</tr>
<tr>
<td><strong>Broad-Based Crowdsourcing</strong></td>
<td>• Mixed quality of ideas</td>
</tr>
<tr>
<td></td>
<td>• Unrealistic plans</td>
</tr>
<tr>
<td></td>
<td>• Unsustainable over time</td>
</tr>
</tbody>
</table>

Bringing Order to Chaos
Developing a Process to Capture Big Ideas

Six Steps to Sustainably Source Big Ideas

1. Get the right people to buy into the process
2. Define what is (and is not) a big idea
3. Create your RFP to solicit ideas from faculty
4. Promote the process
5. Choose the best ideas through a transparent process
6. Clarify outcomes and next steps

Case Exemplars

Source: Advancement Forum interviews and analysis.
This was the first time this group of campus leaders had come together to focus on generating ideas that philanthropy could fund. They originally didn’t understand why they needed to be involved. It set the stage for a unified approach.”

Jane DiFolco Parker
Vice President, Development
Auburn University

“"The Provost is critical to dean and faculty engagement. He has to place value on it and create an expectation around it—advancement cannot force it. If we can demonstrate that there is potential opportunity for significant philanthropic investment, then it’s an easier sell to the faculty; but it has to be supported by the provost.”

George P. Watt, Jr. 
Executive Vice President, 
Institutional Advancement
College of Charleston

Source: Advancement Forum interviews and analysis.
# Kicking Off the Process

Engage Academic Leadership Constructively and With an Agenda and Goals

<table>
<thead>
<tr>
<th>Big Ideas Kickoff Session Agenda</th>
<th>Tips to Aid the Process to Initiate Big Ideas on Your Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>I. Introduction</strong></td>
<td>Session can be co-facilitated by the Provost and Chief Advancement Officer</td>
</tr>
<tr>
<td>• Purpose and goals</td>
<td>Think about criteria <em>without</em> focusing on philanthropy in order to surface the best ideas on campus</td>
</tr>
<tr>
<td>• Everyone’s role</td>
<td>A transparent process builds positive working relationships with academic partners who participate in the process</td>
</tr>
<tr>
<td><strong>II. Setting Criteria</strong></td>
<td>Forthcoming Toolkit</td>
</tr>
<tr>
<td>• Sample criteria</td>
<td></td>
</tr>
<tr>
<td>• Key questions to define a big idea</td>
<td></td>
</tr>
<tr>
<td><strong>III. Choosing the Best Ideas</strong></td>
<td></td>
</tr>
<tr>
<td>• Decision method</td>
<td></td>
</tr>
<tr>
<td>• Creating a points system</td>
<td></td>
</tr>
<tr>
<td><strong>IV. Starting the Process</strong></td>
<td></td>
</tr>
<tr>
<td>• Timelines for implementation</td>
<td></td>
</tr>
<tr>
<td>• Next Steps</td>
<td></td>
</tr>
</tbody>
</table>

Source: Advancement Forum interviews and analysis.
## Create Evaluative Criteria for Your Institution

### Ensuring Success By Clarifying What is Expected

<table>
<thead>
<tr>
<th>A Big Idea Should:</th>
<th>A Big Idea Should Not:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ Transform the University and the world</td>
<td>☐ Be defined <em>solely</em> by a capital project</td>
</tr>
<tr>
<td>✔️ Make the University unique in the marketplace</td>
<td>☐ Bundle together smaller ideas</td>
</tr>
<tr>
<td>✔️ Focus on where the University is good but could become better</td>
<td>☐ Solely feature a naming opportunity</td>
</tr>
<tr>
<td>✔️ Include areas where the University is emerging as a leader</td>
<td>☐ Lead to slow, incremental improvement</td>
</tr>
</tbody>
</table>

Source: University of California, Davis, CA; Advancement Forum interviews and analysis.
Step 3: Create Your Request for Proposal

Key Information to Objectively Review Ideas

Ensuring RFP Provides Necessary Information

Faculty required to explain:

- Alignment with mission and academic plan goals
- Building on existing academic strengths
- Fostering interdisciplinary collaboration
- Links to fundamental societal challenges or opportunities
- Viable funding model, including philanthropy and institutional funding
- Sustainability beyond three to five years

Questions to Create an Institution-Specific RFP

Institutional Niche

- How does this take advantage of our existing strengths?
- How does this make us unique, or differentiate us in the marketplace?
- How will this make a difference on campus in the long-term?
- Which regional or global problems does this initiative solve?

Implementation Thresholds

- How much is this idea worth?
- Could this idea be funded through philanthropy or other outside sources?
- How will funding be sustained over time?
- How will the project use both existing and new resources on campus?

Forthcoming Toolkit

Source: University of Oregon, Eugene, OR; Advancement Forum interviews and analysis.
Grounding Big Ideas in Reality

Valparaiso University’s Online Submission Form

Three Outcomes for Proposals

- **Rejected Outright**
  Proposals that do not meet the criteria are removed from further consideration

- **“Banked” for Future Consideration**
  Proposals are saved for re-evaluation at a later date

- **Moved to Proposal Stage**
  Chosen ideas are turned into full proposals that include budgets and implementation plans

Step 4: Promote Big Ideas on Campus

A Big Ideas Information Hub

Dedicated Website Clarifies the Process

Call for Big Ideas

The University of California, Davis will enter into the silent phase of a comprehensive fundraising campaign in the next 12 months. A critical component of a successful campaign is the generation of “big ideas” that represent audacious, forward-thinking programs and projects that will keep UC Davis at the forefront of academia, and position us for continued success for many years to come. These Big Ideas will come from all levels of the academic community, including faculty, students, staff, department chairs, center directors, the Council of Deans and Vice Chancellors, and university leadership, and should embody the characteristics listed below:

- Transformational (strategic, reputational, leveraging/inspiring, programmatic, financial)
- Single-concept idea (i.e., not a collection of smaller naming opportunities)
- Build on strength/foundation at UC Davis but moving toward something more leading-edge
- Interdisciplinary OR having an interdisciplinary impact
- Area where we have the unique capacity to be the best

The university has convened a Campaign Steering Committee that is comprised of Acting Chancellor Hexter, all permanent deans, select university administrators, and the chair of the faculty senate. This committee in partnership with students and staff will review initial submissions for Big Ideas, give feedback, and determine which ideas should move forward to the next stage.

Source: University of California, Davis, CA; Advancement Forum interviews and analysis.
Extensive Communication Plan Leads to Success

No Form of Communication Left Untouched

Dedicated Website  Memos From Each Dean  On-Demand Presentations  Q&A and Feedback Sessions  E-News Blast

"The process we executed has been fantastic for development and has had far-reaching benefits for the entire campus. Leadership is thrilled with what came of the process, because it galvanized hundreds of faculty and staff around the idea of stopping, taking a deep breath, and really thinking about what we’re good at, where we can go big, and what will define us for the next 20 to 30 years."

Shaun Keister  
Vice Chancellor, Development and Alumni Relations  
University of California, Davis

Source: University of California, Davis, CA; Advancement Forum interviews and analysis.
### Step 5: Choose the Best Ideas

**Embedding Transparency in the Decision Process**

**Creating a Principled Scoring Process**

#### Big Ideas Criteria

- [✓] Aligned with the strategic plan
- [✓] High degree of distinction related to preeminence in select disciplines
- [✓] Required philanthropy to achieve excellence

#### Big Ideas Scoring System

<table>
<thead>
<tr>
<th>Category</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transformative impact on campus</td>
<td>10</td>
</tr>
<tr>
<td>Meets an immediate need</td>
<td>8</td>
</tr>
<tr>
<td>Increases national acclaim</td>
<td>6</td>
</tr>
<tr>
<td>Creates pan-campus collaboration</td>
<td>4</td>
</tr>
</tbody>
</table>

Maximum score possible: 28

80 Proposals met criteria and continued to scoring process

Source: College of Charleston, Charleston, SC; Advancement Forum interviews and analysis.
### An Objective and Inclusive Evaluation

Scorecards Indicate Best Idea Proposals

**College of Charleston Sample Scorecard**

<table>
<thead>
<tr>
<th>Proposal</th>
<th>Campaign Bucket</th>
<th>Committee Members</th>
<th>Average Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Center for Southern Jewish Culture</td>
<td>Power of Place</td>
<td>Provost 14, VP Advancement 16, VP Business Affairs 16, VP Student Affairs 14, Chief of Staff 24, Director of Athletics 16</td>
<td>16.7</td>
</tr>
<tr>
<td>Student Leadership Initiative</td>
<td>Student-Focused Community</td>
<td>20 14 18 20 18 24</td>
<td>19.0</td>
</tr>
<tr>
<td>Center for Livable Communities</td>
<td>Academic Excellence</td>
<td>9 12 9 8 7 13</td>
<td>9.7</td>
</tr>
</tbody>
</table>

- Proposals from deans and faculty
- Scores from committee members
- Priorities sent to President for approval

30 Priorities sent to President

11 Commitments of at least $1M

$17M Revenue from big ideas

Source: College of Charleston, Charleston, SC; Advancement Forum interviews and analysis.
Step 6: Clarify Outcomes and Next Steps

Closing the Communication Loop

Follow-Up Process at University of California, Davis

- **Thank You Notes**: Provost thanks each faculty member for participating.
- **One-On-One Conversations**: Unit development officers share feedback with faculty members.
- **Release Scores and Comments**: Faculty may request numerical scores and written commentary.
- **Faculty Engagement**: Faculty feel included, better understand advancement’s role, and are willing to participate again.

Process Far Exceeds Expectations

- **40** Proposals expected
- **196** Proposals submitted
- **46** Proposals fully met criteria
- **10** Featured as campaign priorities
- **$40M** First gift from big ideas

Source: University of California, Davis, CA; Advancement Forum interviews and analysis.
Show Results and Repeat the Process

Big Ideas Don’t End At the Deadline

New Faculty

Shifting Research Projects

Dean Turnover

Uncovering Funding Priorities In and Out of Campaign

“Big ideas aren’t generated at once—they come and go, so you can’t just do this and stop. **We’ll do this even if we aren’t in a campaign, because the process works so well.** Leadership sees ideas they haven’t heard about before. They have a better sense of what faculty are passionate about, where the strengths are, or where some faculty have come together for the first time to create these ideas.”

Shaun Keister
Vice Chancellor,
Development and Alumni Relations
University of California, Davis

Source: University of California, Davis, CA; Advancement Forum interviews and analysis.
### Key Takeaways

- Institutional leadership defines what constitutes a big idea
- Design an RFP to include academic and philanthropic goals
- Widely promote the process
- Select ideas through a transparent, principled process
- Follow-up with all participants to clarify next steps
- Repeat the process regularly

### Forthcoming Resources

Ease implementation with:
- Big Ideas Kickoff Session Agenda and Talking Points
- RFP Template and Guiding Questions
- Big Ideas Communication Plan Template
- Idea Selection Guide, Scoresheet Template
- Faculty Follow-Up Timeline and Conversation Guide

Source: Advancement Forum interviews and analysis.
A Tool to Get You Started

Discussion/Self-Reflection and Implementation Guide

- Assess how you currently identify fundraising priorities
- Identify strengths and areas for improvement
- Select aspects of the big ideas process to implement
- Prioritize practices to implement immediately or consider for the future

Evaluating Today’s Session

Please take a minute to complete our survey about today’s webconference.

Contact Information

Dena Schwartz
Analyst
dschwartz@eab.com

Source: Advancement Forum interviews and analysis.